

Employee Post-Travel Disclosure of Travel Expenses

SECRETARY OF THE SENATE
PUBLIC RECORDS
2019 OCT 31 PM 12:28

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): Wednesday, October 9 - Friday, October 11, 2019

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$28.28	\$304 + tax	\$137.00	\$14 Educational tour, USCGC Taney
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	n/a	n/a	n/a	n/a
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

See attached agenda.

10/30/19
(Date)

Charles T. Breerton
(Printed name of traveler)

[Signature]
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/31/2019
(Date)

Laura Alexander
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation
2. Description of the trip: Three-day educational conference to teach Congressional staff leadership and policy skills.
3. Dates of travel: Wednesday, October 9, 2019 - Friday, October 11, 2019
4. Place of travel: Baltimore, MD
5. Name and title of Senate invitees: See Attached
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
– OR –
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
– AND –
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
– AND –
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

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☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation hosts around 400 events on Capitol Hill each year. These include educational fellowships, topical briefings, and policy working groups.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$20.63	\$304.00	\$177.50	\$12.00
<input type="checkbox"/> Actual Amounts				(Educational tour of the USCGC Taney)

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip is arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Baltimore, MD is easily accessible from Washington, and it is an appropriate distance from DC to ensure focus on the educational benefits of the trip.

19. Name and location of hotel or other lodging facility:

Royal Sonesta Harbor Court

550 Light St, Baltimore, MD 21202

20. Reason(s) for selecting hotel or other lodging facility:

The Royal Sonesta has adequate facilities and meeting space for a group this size.

- The lodging expenses are equal to the federal per diem rate for Baltimore, MD.

The meal expenses are below the federal per diem rate for Baltimore, MD.

- Attendees will travel in a coach charter bus.**

- None.

- Signature of Travel Sponsor:**

E-mail Address: thomas.binion@heritage.org



August 7, 2019

Dear Charlie,

On behalf of The Heritage Foundation, I want to formally extend an invitation to The Heritage Foundation's 2019 Emerging Leaders Conference. The event will be held Wednesday, October 9 – Friday, October 11 in the Inner Harbor in Baltimore, MD.

At the Emerging Leaders Conference, attendees will discuss issues confronting the next Congress, develop their leadership skills, and sharpen their knowledge of process, rules and procedure. An educational experience tailored to work on Capitol Hill, this conference also promises an excellent opportunity to grow your network among your colleagues and expand your impact.

All paperwork must be submitted to the Ethics Committee no later than Monday, September 9, 2019. Here is what you need to submit for this year's trip:

1. Register with Heritage at <https://events.heritage.org/Leaders2019>
2. Submit the attached packet to the Ethics Committee
3. Fill out and submit the Employee Pre-Travel Authorization to the Ethics Committee

Emerging Leaders will be held during a recess week for both House and Senate staff. Heritage will provide transportation, overnight accommodations, and meals throughout the retreat.

Please let me know if you have any questions, looking forward to having you with us this year.

Sincerely,

1203

Thomas Binion
Vice President, Government Relations
The Heritage Foundation

Emerging Leaders Conference 2019

Wednesday, October 9 – Friday, October 11, 2019
Royal Sonesta Harbor Court | Baltimore, MD

AGENDA

WEDNESDAY, OCTOBER 9, 2019

- 1:00 p.m. – 1:30 p.m. **ATTENDEE CHECK-IN** *The Heritage Foundation*
Attendees leave luggage at the bus after check-in
- 1:45 p.m. **ATTENDEES BOARD THE BUS**
- 2:00 p.m. **BUSES DEPART TO ROYAL SONESTA HARBOR COURT**
- 3:15 p.m. **BUSES ARRIVE AT ROYAL SONESTA HARBOR COURT**
- 3:30 – 5:30 p.m. **REGISTRATION**
Attendees check-in to overnight rooms
- 5:30 – 6:30 p.m. **WELCOME RECEPTION AND OVERVIEW**
Participants will gather for the first time as a group to hear brief welcome remarks. These remarks will include the purpose of the conference, a review of the agenda, and an opportunity for participants to ask any questions about logistics.

Tommy Binion
Vice President, Government Relations
The Heritage Foundation
- 6:30 – 8:30 p.m. **OPENING DINNER AND KEYNOTE ADDRESS**
LESSONS ON SERVANT LEADERSHIP
Servant leadership is critical in leading effective teams and living a life of purpose. Through experiences in the NFL, House of Representatives, and now at his own veterans' aid charity, Yellow Ribbons United, Derrick Dockery has led a life that exemplifies servant leadership. Dockery will discuss what it means to be a servant leader and how to use one's talents effectively to give back to their community and live a purposeful life for others.

Derrick Dockery
Co-Founder, Yellow Ribbons United
Former Business & Intergovernmental Coalitions Director, Office of Speaker Paul Ryan
Former Offensive Lineman, National Football League

THURSDAY, OCTOBER 10, 2019

- 9:00 – 10:15 a.m. **BREAKFAST ADDRESS AND EMERGING ISSUE #1**
TECHNOLOGY & THE FUTURE OF U.S. NATIONAL SECURITY

Technology is a defining variable in the American national security calculus. These tools are not only how modern warfare is fought, but they are increasingly the battlefield itself. How does the United States navigate the tensions between free-market economics and the existential challenge of preventing Chinese cyber-enabled espionage? What are the responsibilities of US companies who are the bleeding-edge of technology innovation in an international system that sees these innovations as offering decisive advantage? In short: how can the United States thrive in an era of technological great power competition?

Klon Kitchen

Senior Research Fellow, Technology, National Security, and Science Policy
The Heritage Foundation

10:15 – 10:30 a.m. **BREAK**

10:30 a.m. – 12:00 p.m. **BUDGET SIMULATION & BREAKOUT DISCUSSION**

Conference participants will participate in a budget simulation game whereby they are divided into teams and tasked with reaching a budget deal and passing a budget resolution for the upcoming fiscal year. Each participant will draw a card from a stack, and each card will detail the team, role, and individual objectives of that participant. Participants will divide into teams, where they will hear from a Heritage expert, or 'Counsel', on the budget process and their respective teams' role in that process. Each team will also elect a participant to serve as 'leadership' for that team. Leadership conducts negotiations and speaks on behalf of the team before a large group.

Participants will conduct negotiations within and between teams, attempting to reach a deal despite the conflicting interests of each individual and party. There will be time to negotiate and whip votes between policy sessions and outside of the designated budget simulation sessions. The budget resolution will include the total funding for discretionary spending (302a allocation), the topline numbers for each individual appropriations bill (302b allocations), and policy riders. On the final morning of the trip, participants will vote on the budget resolution. It will pass with a simple majority, and participants cannot filibuster.

Tommy Binion

Vice President, Government Relations
The Heritage Foundation

12:00 – 12:15 p.m. **BREAK**

12:15 – 2:00 p.m. **LUNCHEON AND KEYNOTE ADDRESS:**

TWITTER-CRAFT: COMMUNICATIONS IN THE DIGITAL AGE

The media has changed the way the public learns issues, understands concepts, forms opinions, and spreads ideas, making effective communication vital in today's increasingly social and digital environment. What are the most effective ways to communicate? How does this change based on the issue being discussed?

Carrie Severino

Chief Counsel & Policy Director
Judicial Crisis Network

Rob Bluey

Vice President, Communications, The Heritage Foundation
Executive Editor, the Daily Signal

2:00 – 3:00 p.m. **BREAK**

3:00 – 4:00 p.m. **EMERGING ISSUE #2:
THE FREE MARKET & THE FAMILY**

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The driving fuel behind the strength of American families is the free enterprise system. The free market naturally and ceaselessly excels in creating opportunities and prosperity for families in ways that empower them. Government 'family support' programs, on which we spend \$1.2 trillion per year, are inherently inefficient, one-size-fits all, and constantly having to adjust and expand in attempt to meet families' needs.

Rachel Greszler
*Research Fellow in Economics, Budget, and Entitlements
 The Heritage Foundation*

Clarence Carter
*Director of the Office of Family Assistance
 Acting Director of the Office of Community Services, Administration for Children & Families
 Department of Health & Human Services*

Joel Griffith
*Research Fellow, Financial Regulations
 The Heritage Foundation*

4:00 – 4:15 p.m.

BREAK

4:15 – 5:15 p.m.

**EMERGING ISSUE #3:
 REFRAMING THE FUTURE OF HIGHER EDUCATION**

Today's higher education system is in crisis. American students are \$1.6 trillion in student loan debt, the majority of students will not finish college in four years, and many drop out without a degree and struggling to pay off debt. Unfortunately, policies from Washington make these problems worse. While many claim that "free" college is the answer, this will only shift the present problems with higher education onto American taxpayers. Only by encouraging competition and innovation in the higher education sector, and reducing funds coming from Washington, can we see true improvements for students and taxpayers.

Mike Howell
*Executive Branch Advisor, Government Relations
 The Heritage Foundation*

Angela Sailor
*Vice President, Feulner Institute
 The Heritage Foundation*

Mary Clare Amselem
*Policy Analyst, Center for Education Policy
 The Heritage Foundation*

5:15 – 5:30 p.m.

REACH A BUDGET DEAL
Participants will reach a deal by this time in the trip. The Leader will read the budget resolution aloud to the body.

5:30 – 6:30 p.m.

RECEPTION

6:30 – 8:30 p.m.

**DINNER AND KEYNOTE ADDRESS:
 LEADERSHIP LESSONS FROM THE THUNDERBIRDS**
Effective leaders seek to build commitment, trust, and loyalty with their teammates, whether that is in the field or in the workplace. JV Venable discusses lessons learned from serving for 25 years in the US Air Force. JV, who served as Commander of the celebrated Thunderbirds, also authored a book on leading high performance teams.

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8:30 a.m. (or after)

Attendees leave their luggage at the Heritage luggage check

BREAKFAST ADDRESS & EMERGING ISSUE #4:

Healthcare has become one of the defining issues of our current debate. Now more than ever, policy proposals such as single-payer universal care, eliminating public options, and privatized care, are drastically different from one another and from the status quo. This panel will review the current state of America's healthcare system and discuss solutions that have been prescribed to fix many of the problems arising from this system, ultimately addressing the question: What do Americans really want in health care?

Nina Schaefer
Senior Research Fellow, Health Policy
The Heritage Foundation

Matt Eagan
Program Associate, Congressional Relations
The Heritage Foundation

BREAK

FINAL VOTES

Participants will vote on the budget resolution.

LOAD BUS

WALK TO USCGC TANEY

TOUR & DISCUSSION AT USCGC TANEY

The United States Coast Guard Cutter Taney is the last warship still afloat that fought in the attack on Pearl Harbor. The USCGC Taney offers tours of the vessel, after which participants will learn about the historical and military context of the attack on Pearl Harbor in relation to military readiness today.

Dakota Wood
LtCol USMC (ret.)
Research Fellow, Defense Programs
The Heritage Foundation

CLOSING REMARKS

Tommy thanks participants for attending this year's conference.

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2:30 p.m. **BUS ARRIVES AT THE HERITAGE FOUNDATION**



Emerging Leaders Conference 2019

Wednesday, October 9 – Friday, October 11, 2019

Royal Sonesta Harbor Court | Baltimore, MD

INVITATION LIST

About the List:

The following individuals were extended an invitation to The Heritage Foundation's 2019 Emerging Leaders Conference due to their interest in conservative policy.

Last Name	First Name	Office	Chamber
Anderson	Alyssa	Rep. Tom Emmer	House
Andrade	Barbara	Rep. Rob Bishop	House
Andzel	Christian	Rep. Chip Roy	House
Ath	Viraktep	Sen. Steve Daines	Senate
Ball	Luke	Rep. Matt Gaetz	House
Bardin	Erin	Sen. James Risch	Senate
Barton	Carter	Rep. Virginia Foxx	House
Bennett	Parker	Rep. Mike Kelly	House
Bensur	Will	Rep. John Katko	House
Besonen	Mark	Rep. Virginia Foxx	House
Boyd	Stephen	Sen. James Lankford	Senate
Bradley	Philippa	Rep. David McKinley	House
Brereton	Charlie	Senate HELP Committee	Senate
Brookhart	Mindy	Sen. John Hoeven	Senate
Brown	Matt	Rep. Bryan Steil	House
Butherus	Daniel	Rep. Ken Buck	House
Caddock	John	Rep. Alex Mooney	House
Campbell	Kyle	Rep. Tom McClintock	House
Caplin	Sarah	Sen. Mike Lee	Senate
Carrier	Adrienne	Sen. Mike Braun	Senate

Wilson	Jordan	Rep. Rob Wittman	House
Wing	Kirsten	Senate Finance	Senate

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC SEP25'19PM 5:02

originally submitted on Sept. 9

Name of Traveler: Charles T. BreretonEmploying Office/Committee: HELP CommitteePrivate Sponsor(s) (list all): The Heritage FoundationTravel date(s): Wednesday, October 9, 2019 - Friday, October 11, 2019*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*Destination(s): Baltimore, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

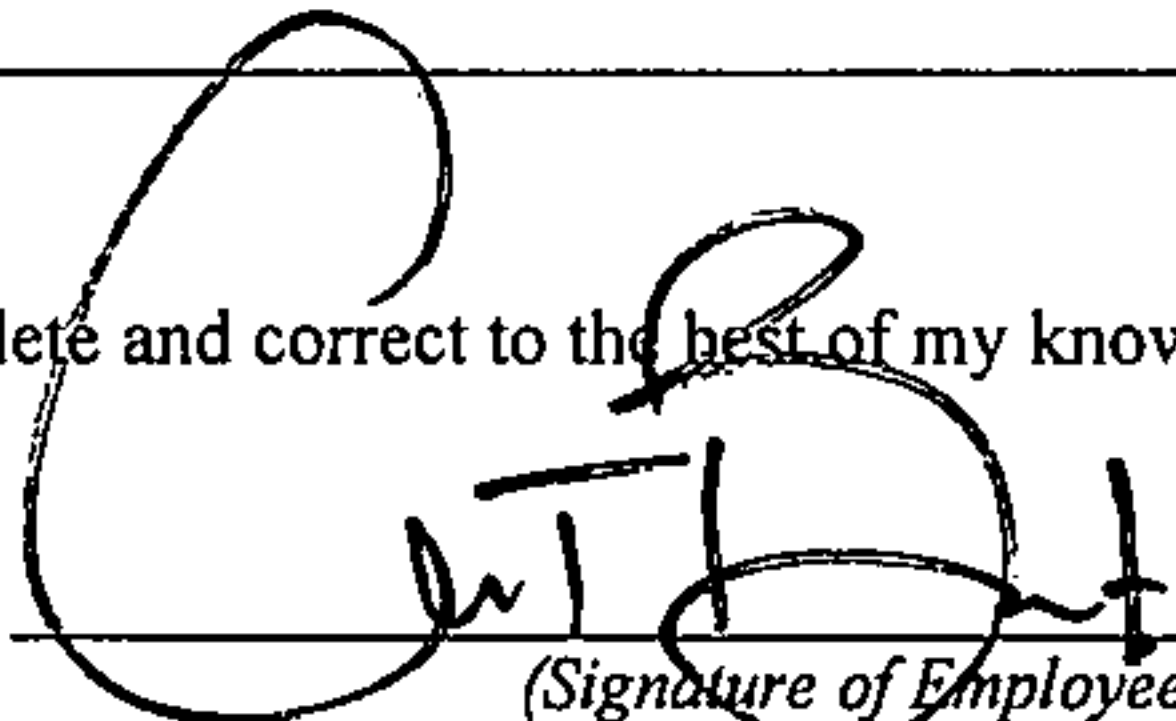
I am a Health Research Assistant for the HELP Committee, working on issues related to biomedical research, the health care workforce, substance use disorder and mental health services, and tobacco. During this educational conference, policy experts will brief House and Senate staff on emerging health care proposals and the inner-workings of federal budget negotiations, both of which are highly relevant to my daily activities.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/25/19
 (Date)


 (Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Alexander hereby authorize Charles Brereton
 (Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9.25.19
 (Date)


 (Signature of Supervising Senator/Officer)